MISSOURI TOOLBOX 2.0
CAP Desk Aid

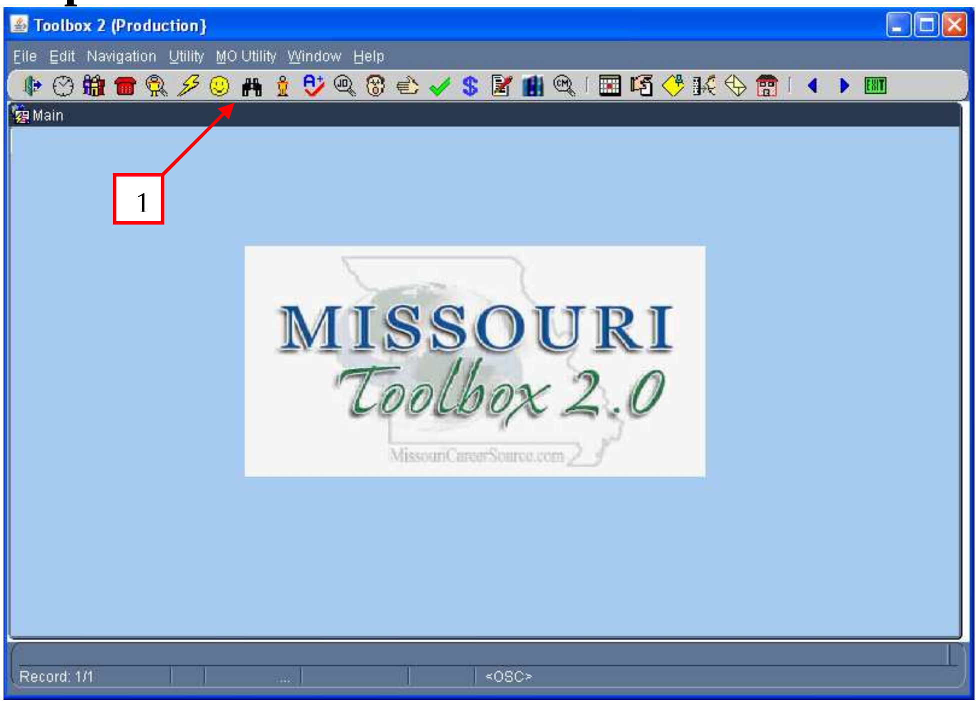
Career Assistance Program Procedure Manual

Table of Contents

Seeker: Searching for a record

Searching for new clients in Toolbox 2.0 that you are not case managing.

Step-by-Step:



1. Click on  **Find Seeker** icon (or press Ctrl + N) to bring up the Seeker screen.
2. Under the Find Seeker Tab, enter the appropriate search criteria to search for the client.

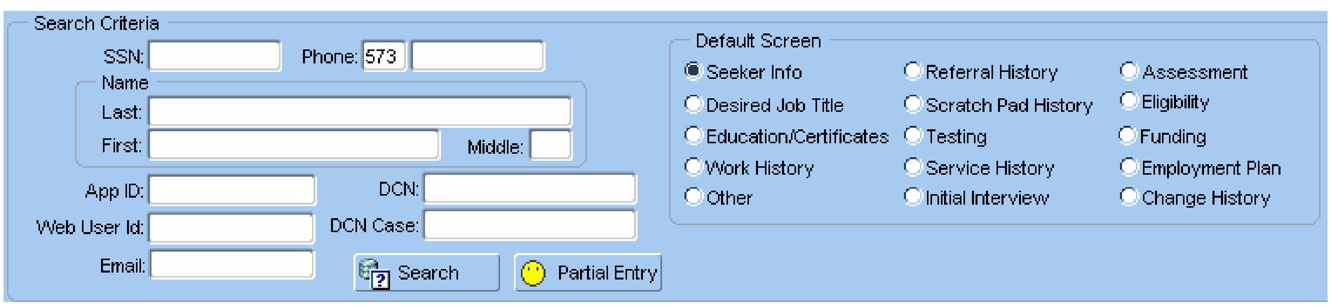


Figure 1: Seeker Search Criteria

3. After the system returns the results of your search, double-click on the appropriate name to bring up the correct record.

Seeker: Entering Seeker Information

If you have searched for the client and do not find any record of the client in Toolbox 2.0, you must **enter the seeker information.**

Step-by-Step:

1. Click on the  Seeker Entry icon (or press Ctrl + K.)
2. For CAP clients, enter information in **all** fields located in the Basic tab screen. (see Figure 2)

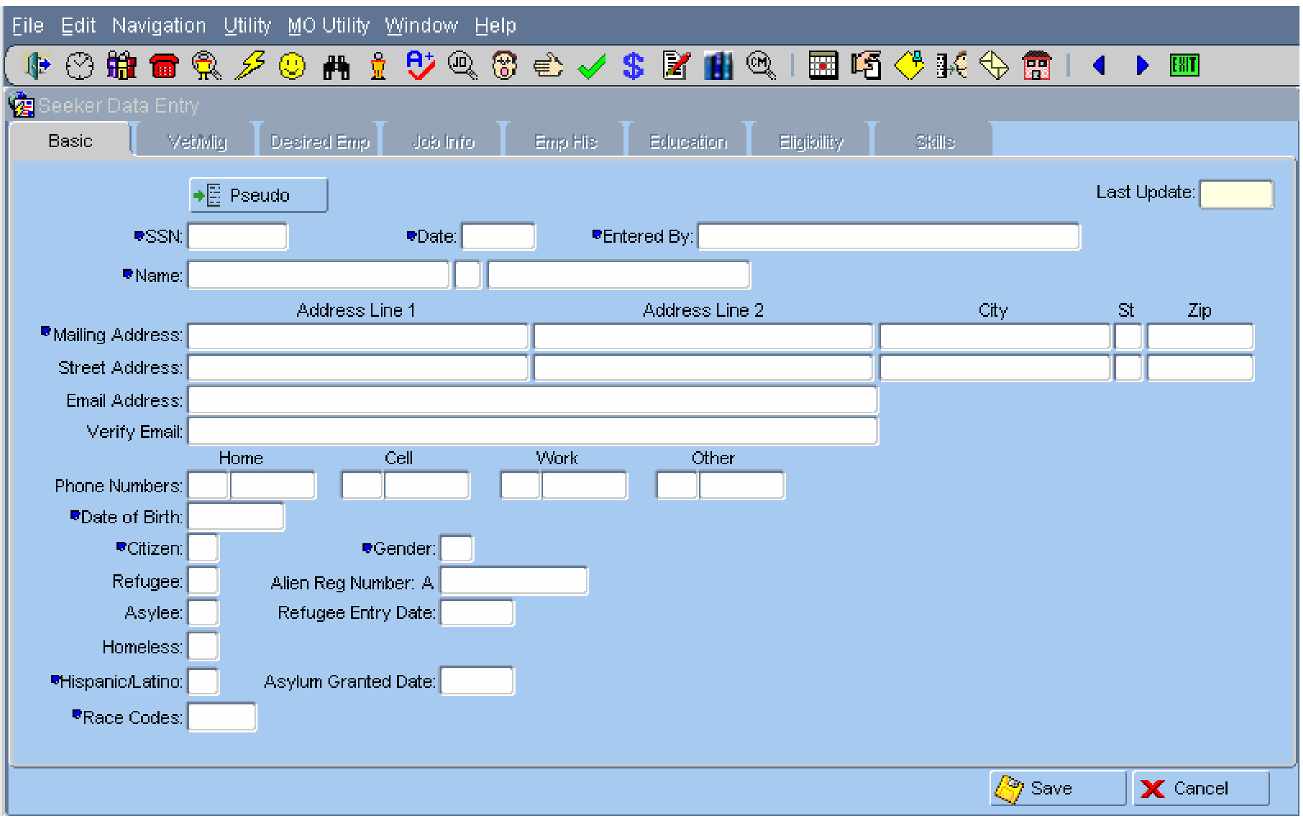


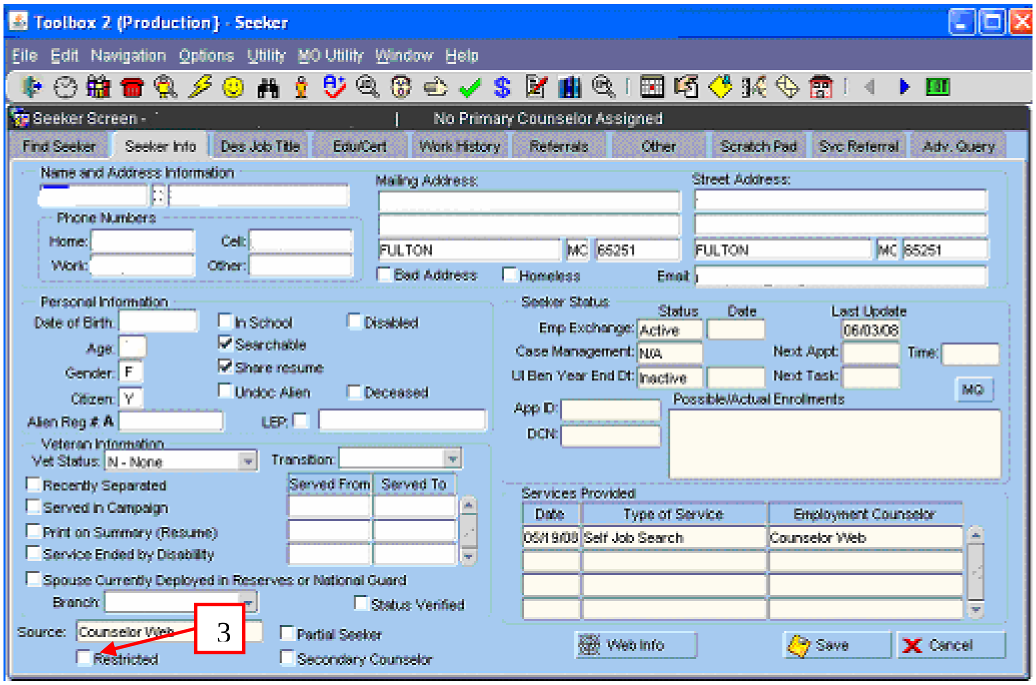
Figure 2: Seeker Data Entry Basic Tab Screen

Restrict/Unrestrict Records

Restricting an unrestricted record

Step-by-Step:

1. Open a seeker record.
2. Click on the Seeker Info Tab.



3. Click on the “Restricted” checkbox at the bottom left side of the screen. A check mark appears in the box to signify the record is restricted.
   (NOTE: This will send an alert to FSD indicating that the record has been **restricted** due to domestic violence.)

Unrestricting a restricted record

Step-by-Step:

1. Open a seeker record.
2. Click on the Seeker Info Tab.
3. Click on the “Restricted” checkbox (if checked), to uncheck the “Restricted” checkbox.
   (NOTE: This will send an alert to FSD indicating that the record has been **unrestricted** and the client is no longer in a domestic violence situation.)

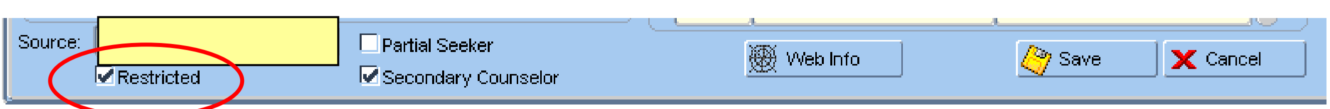


Figure 3: Restrict a Record

Teen Parents

The Teen Parent indicator is located on the Employment Plan/Enrollment screen, in the Enrollment tab. If the individual is a teen parent the "Teen" box will be checked.

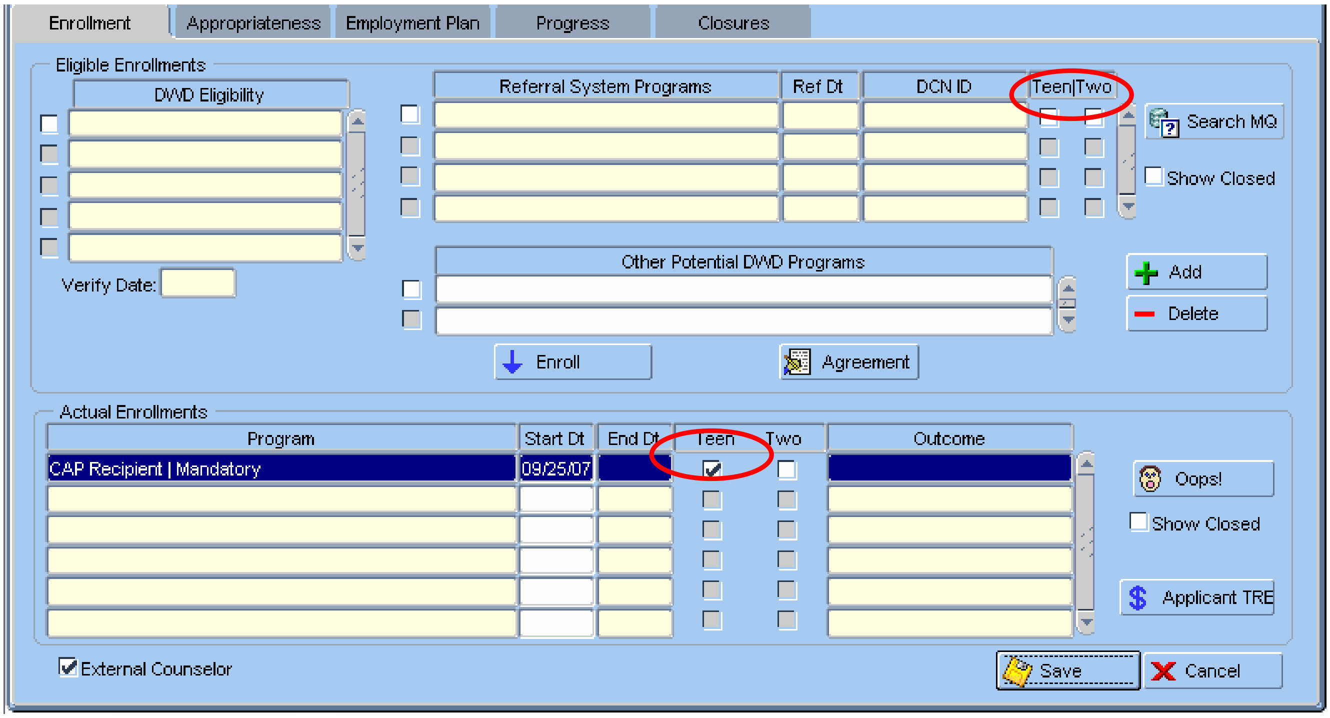


Figure 4: Teen Parent Enrollment

<u>Sending Teen Parent in an Educational Activity Alert</u>

Step-by-Step:

1. Click on the icon to access the Assessment screen (or press Ctrl + A)
2. Click to select the "Education" Tab.
3. Click on the icon. This will bring up the School information screen.
4. Enter School Information.
5. Click on "Close" to exit out of this screen. (figure 5)
6. Click on "Save" to save the information and send the alert to FSD.

Sending Teen Parent Not in an Educational Activity Alert

Step-by-Step:

1. Click on the icon to access the Assessment screen (or press Ctrl + A)
2. Click to select the “Education” Tab.
3. Click on the icon. This will bring up the School information screen. (figure 5)
4. Enter “End Date”.
5. Click on “Close” to exit out of this screen.
6. Click on “Save” to save the information and send the alert to FSD.

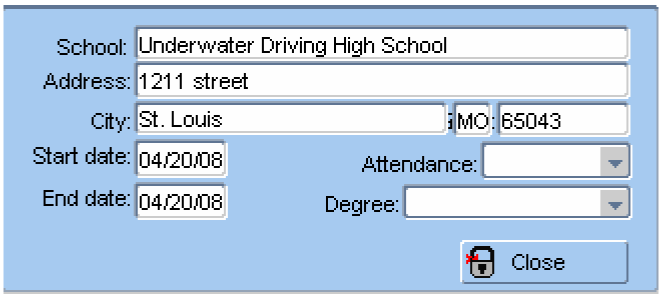


Figure 5: School Information Screen

Two Parents

Viewing two parent information

Step-by-Step:

1. Click on the Seeker icon (or press Ctrl + S)
2. Click on the Seeker Info tab.
3. Click on the Two Parent button to view the other parent information. (figure 6)
4. Click on the Two Parent button again to go back to the original parent information.

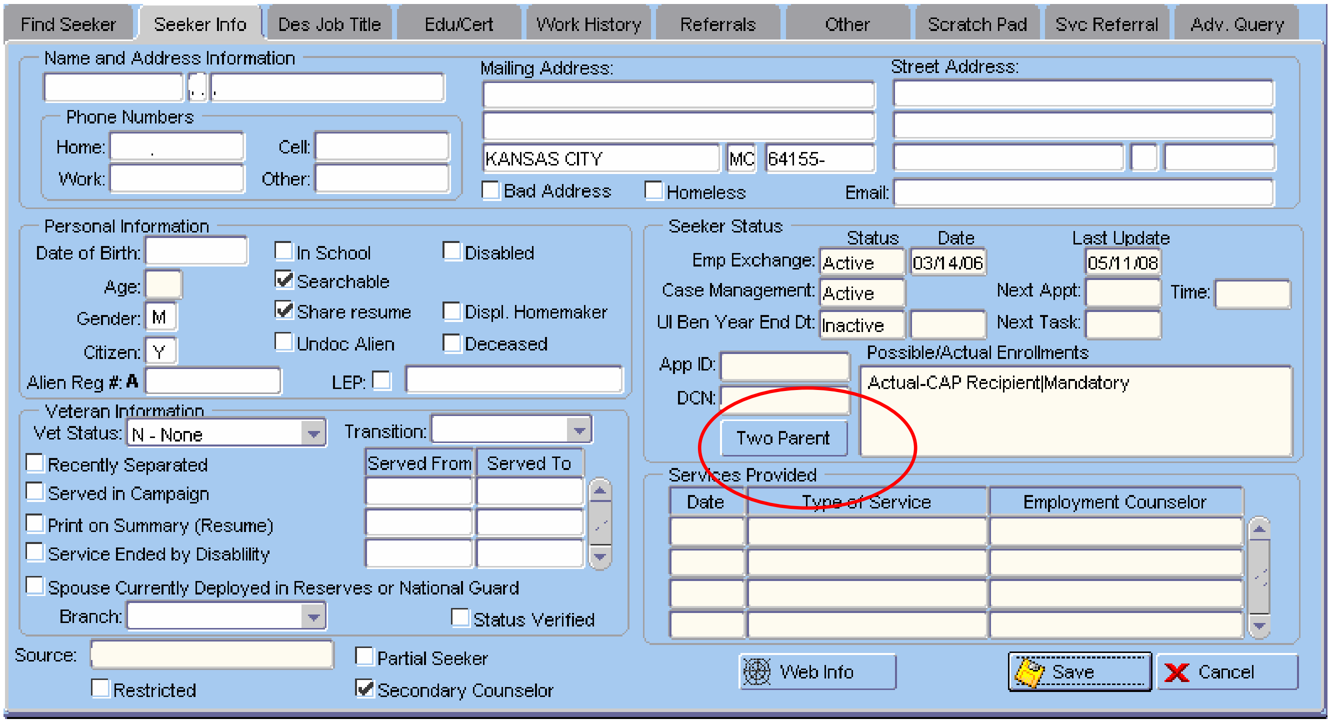


Figure 6: Two Parent Information

Call-In Letters

Bringing up the list of Call-In Letters

Step-by-Step:

1. From the **MO Utility menu**, click to select “Call-in Letters”
2. Select the Office for the Call-in Letter
3. Select the appropriate letter. (see list below)
4. Click on the box next to the individual’s name to select the records.
5. Alter letter information if appropriate.
6. Click on “Send Letters” to send.

NOTE: You will see the list of Call-In Letters for the Office that you are logged into.

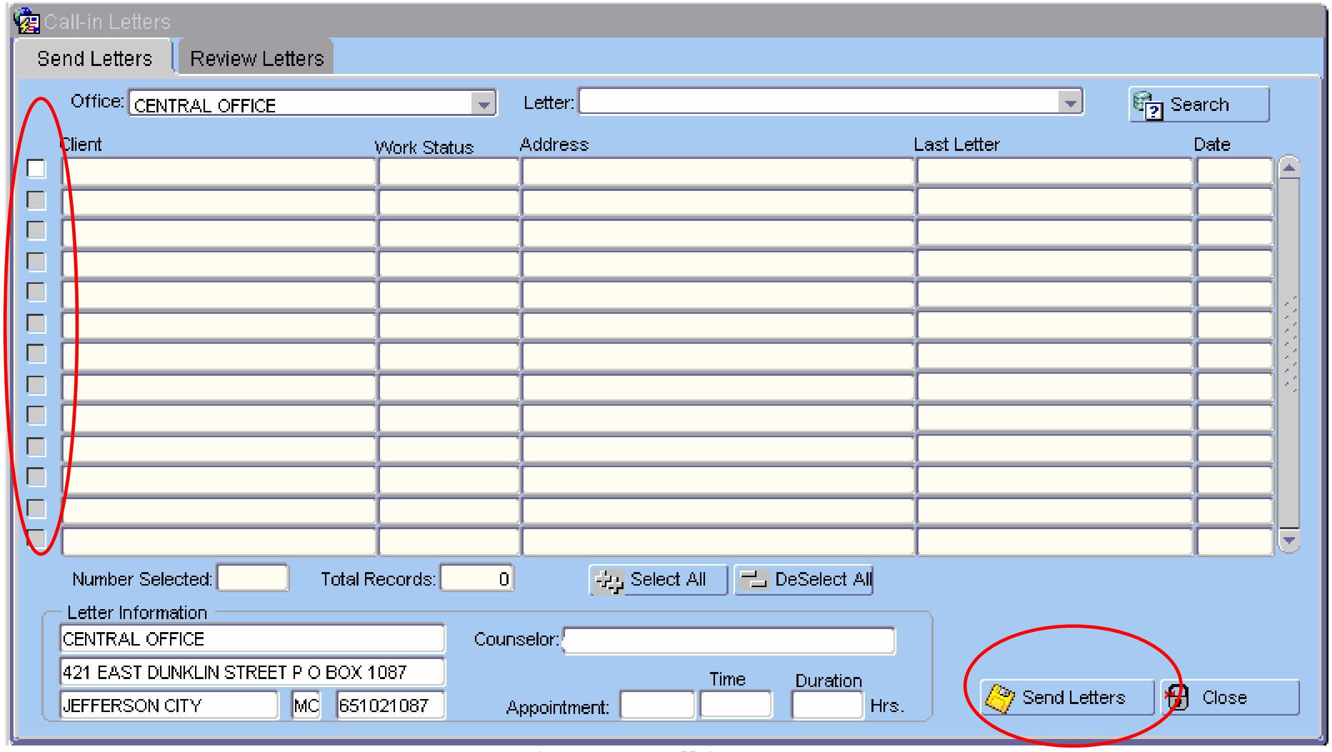


Figure 7: Call-in Letters

<u>Reviewing sent Call-In Letters</u>

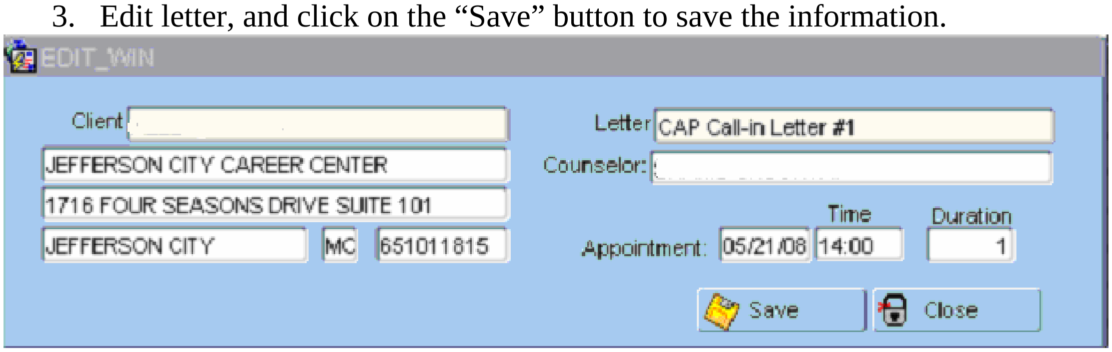
Step-by-Step:

1. After the letters have been sent, click on the "Review Letters" Tab.
2. Click on the icon to bring up a copy of the Call-In Letter that has been sent.

<u>Editing sent Call-In Letters (Option 1)</u>

Step-by-Step:

1. After the letters have been sent, click on the "Review Letters" Tab. (You have until 4:00 P.M. the same day to edit the letter.
2. Click on the icon to bring up a copy of the Call-In Letter edit screen.
3. Edit letter, and click on the "Save" button to save the information.



<u>Editing sent Call-In Letters (Option 2)</u>

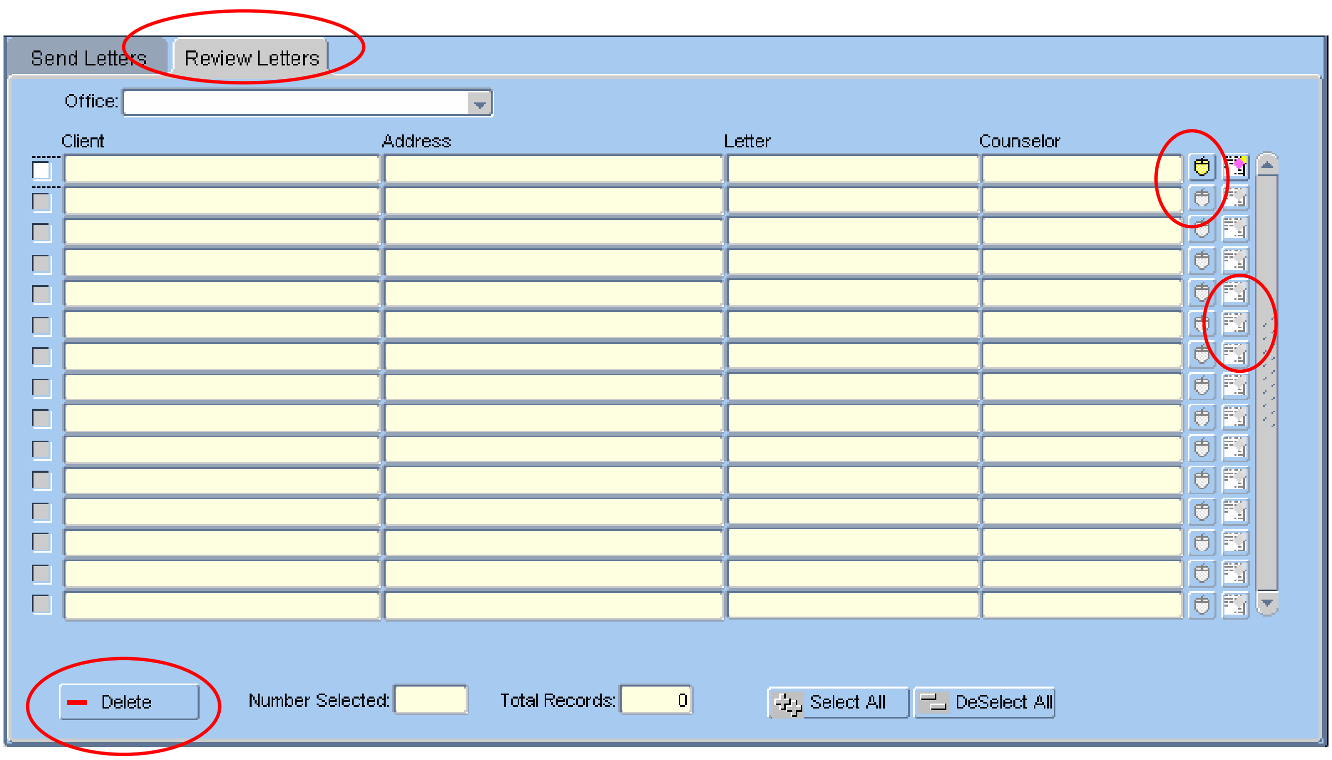
Step-by-Step:

1. Click on the  Correspondence icon. (or press Alt + C)
2. Select the Query tab.
3. Double click on the record that you wish to edit.
4. This will bring up the Edit/Create tab, make appropriate edits on this screen.
5. Click on the “Save” button to save the data.
6. Click on the “Preview” button to preview the letter.

<u>Deleting sent Call-In Letters</u>

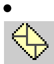
Step-by-Step:

1. After the letters have been sent, click on the “Review Letters” Tab. (You have until 4:00 P.M. the same day to delete the letter.
2. Select the appropriate letters that need to be deleted by clicking on the check box.
3. Click on the “Delete” button to delete the letter or letters.



<u>Free Form Letters</u>

Step-by-Step:

1. Click on the  Correspondence icon. (or press Alt + C)
2. Select the Edit/Create tab.

3. From the **Category** field List of Values (LOV), select “General”.
4. From the **Document Type** field drop down menu, select “Free Format Letter”.
5. Type correspondence in the **Insert your text here** field.
6. If there are any additional comments that need to be added, type them in the **Additional Comments** field. This text will appear after the signature block.
7. Click on the “Save” button to save the letter.

NOTE: Click on “Preview” to view and print the letter for mailing. DWD will not be mailing Free Format letters.”

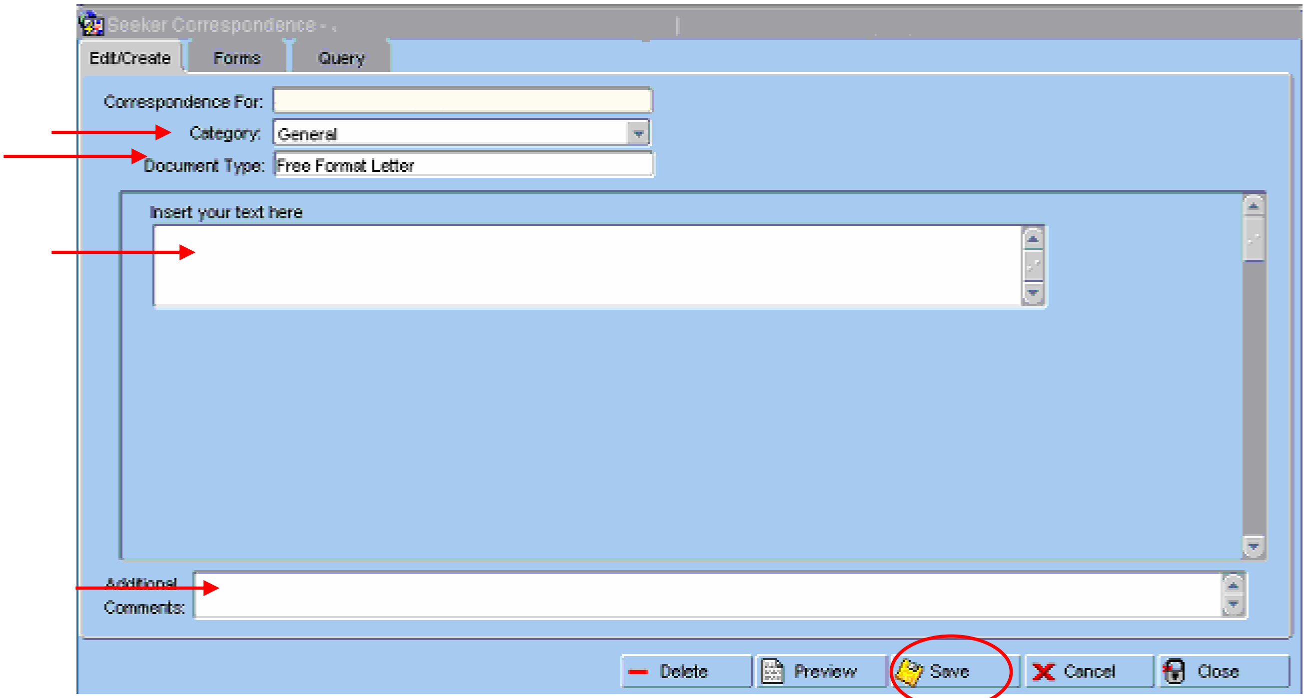
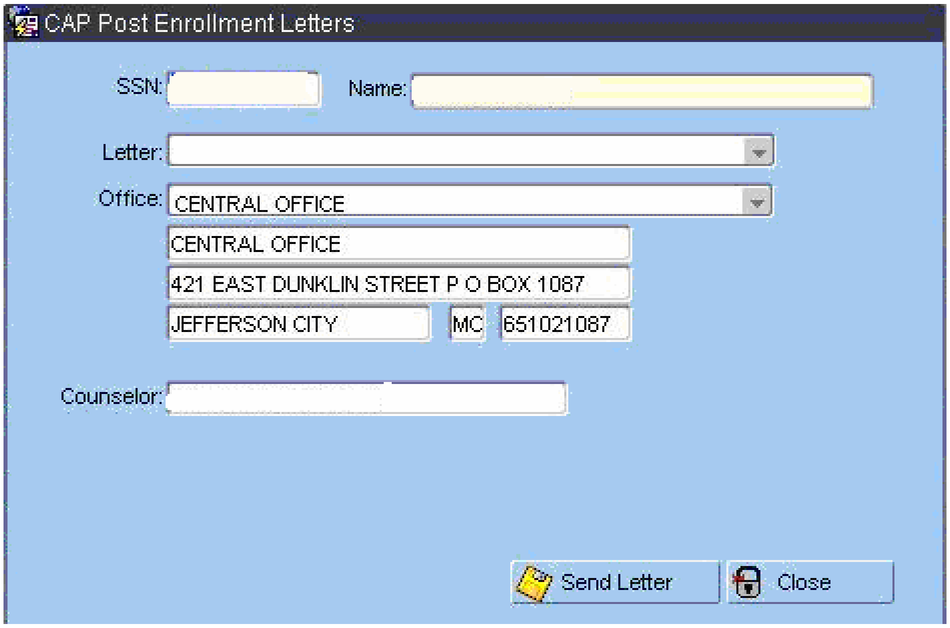


Figure 8: Correspondence Edit/Create Letters tab (Free Form letters)

Sending a Post-Enrollment Letter

- Step 1: Select ‘Options’ on the menu bar.
- Step 2: Select ‘MO Program Specific’ from the list. [this is new and will be put into production on Monday, August 4]
- Step 3: Select ‘CAP Post-Enrollment Letters’. The pop-up box below will display.
- Step 4: Complete the necessary information required to send the letter. Hit the ‘Send Letter’ button.

You can review a file copy of the letter by clicking on the ‘Review Tab’ from the Call-in List screen, clicking on the ‘Query’ tab from the Seeker Correspondence screen, or double-clicking on the letter name from the Seeker Histories screen.



Again to delete the letters, there are several ways to do so. Please refer to the following instructions:

Deleting Post-Enrollment Letters

Functionality #1

- Step 1: Select 'MO Utility' from the menu bar.
- Step 2: Select 'Call-in Letters'.
- Step 3. Click on the 'Review Letters' tab
- Step 4. Click on the check box next to the participant's last name or highlight the name.
- Step 5: Click on the 'Delete' button.

Functionality #2

- Step 1: Click on the Seeker Correspondence icon .
- Step 2: Highlight the letter to be deleted or click on the box next to the participant's last name.
- Step 3. Click on the 'Delete' button.

Functionality #3

- Step 1: Click on the 'Seeker Histories' tab.
- Step 2: Highlight the name of the letter you wish to delete.
- Step 3: Click the 'Delete' button located in the bottom left portion of the screen.

Forms

Bringing up Forms

Step-by-Step:

1. Click on the Correspondence icon. (or press Alt + C)
2. Select the “Forms” tab. On the left side of the screen, you will see a list of all forms available.
3. From the list of forms, click on the form name to select it.
4. Click on the > button to move the form to the right side of the screen. (figure 9)
5. Click “Preview” to print.

NOTE: At the time of this desk aid version, <u>not all information</u> is available in Toolbox 2.0. Desk aid updates will be completed as functionality becomes available.

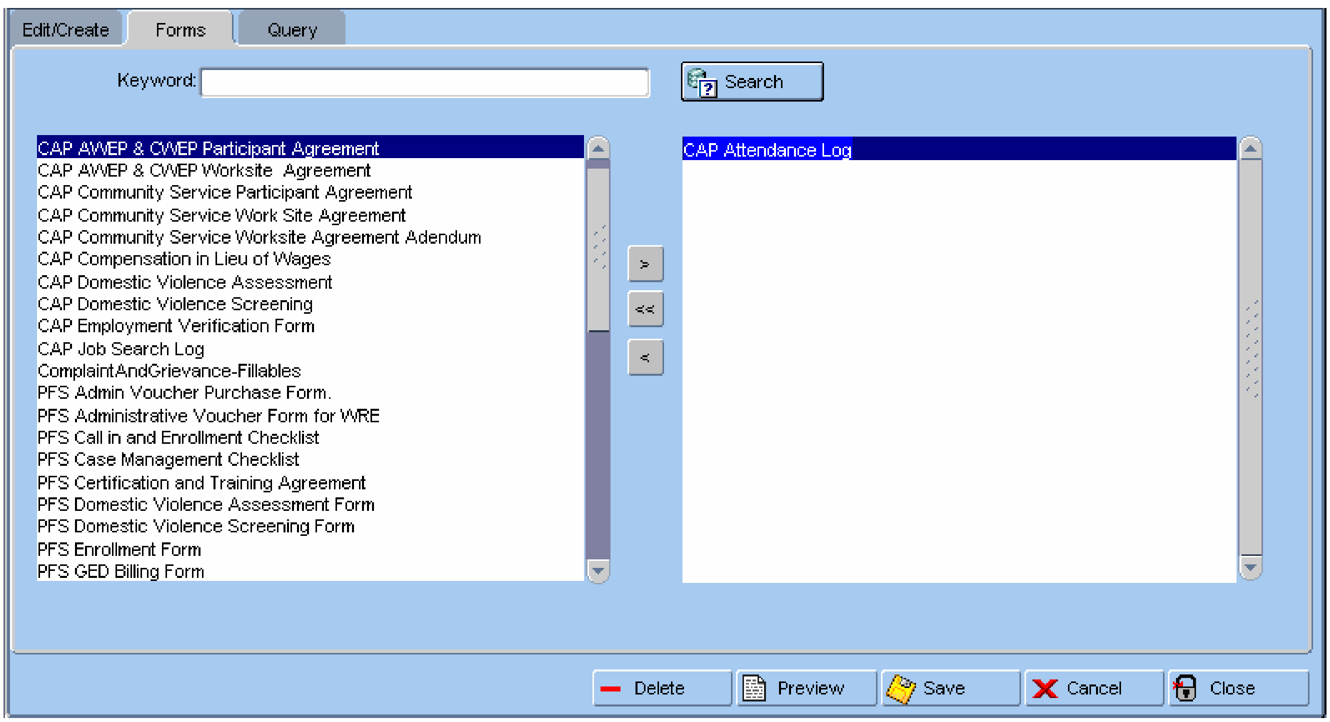
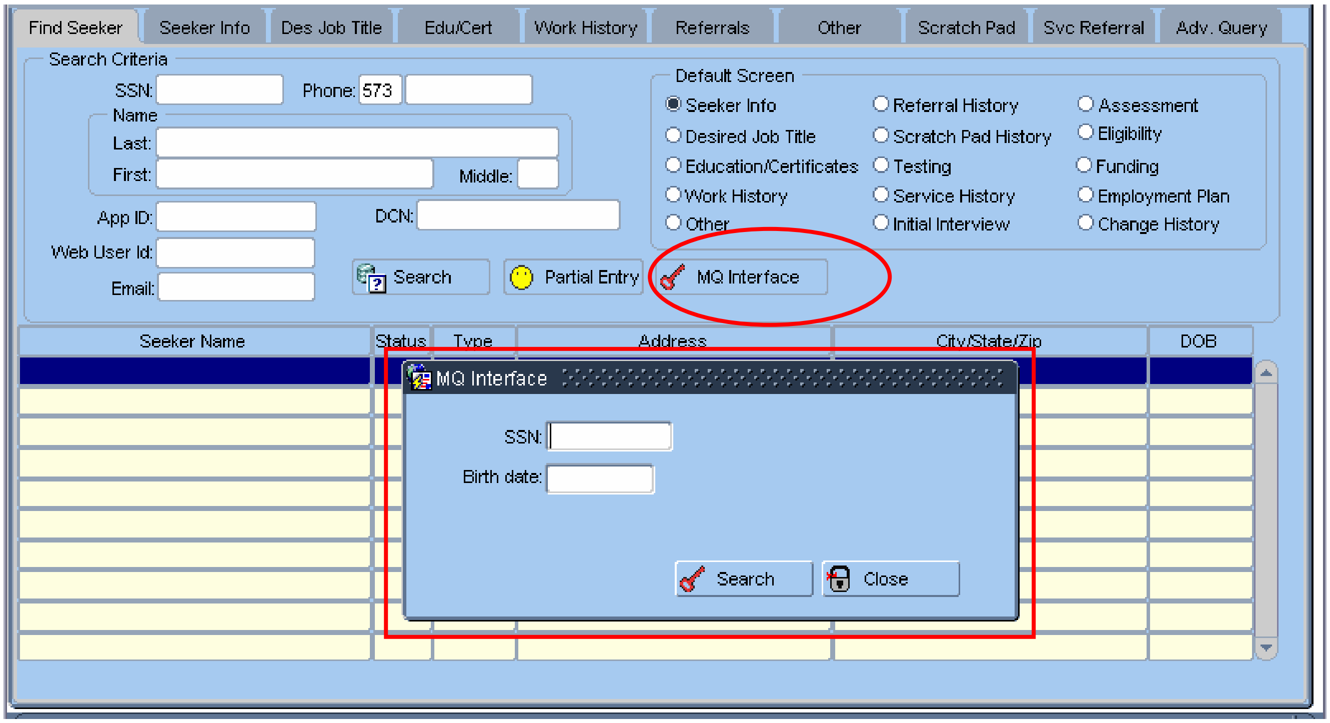


Figure 9: Correspondence Edit/Create Letters tab (Free Form letters)

MQ Search

To perform a MQ Search click on the **Find Seeker** icon (or press Ctrl + N). Then click on the MQ Interface button, this will bring up another window. Enter the individuals Social Security Number and date of birth to perform the MQ search.



Activate/Inactivate Case Management

For new records that have not been placed in case management in the past, the case management functionality will have to be activated.

Activating the case management functionality

Step-by-Step:

1. From Menu, click on "Options."
2. From Options, select "Activate/Inactivate Case Mgmt."

NOTE: This is an "on/off" feature. If activate Case Mgmt is selected, click again to deactivate.

Enrollment

Enrolling a client in CAP

Step-by-Step:

1. Click on  Employment Plan/Enrollment icon (or press Ctrl + E).

   If no counselor is assigned to this record, a window will appear with the following question: "Do you want to be assigned as the primary Employment Counselor for this seeker?" (see Figure 10)

2. Answer the employment counselor question using the follow options:
   - If you will be the primary counselor click **Yes**.
   - If you will not be the primary counselor, click **No** and continue to Step 3.
   - If no counselor will be assigned the "**x**" at the top right to Cancel.

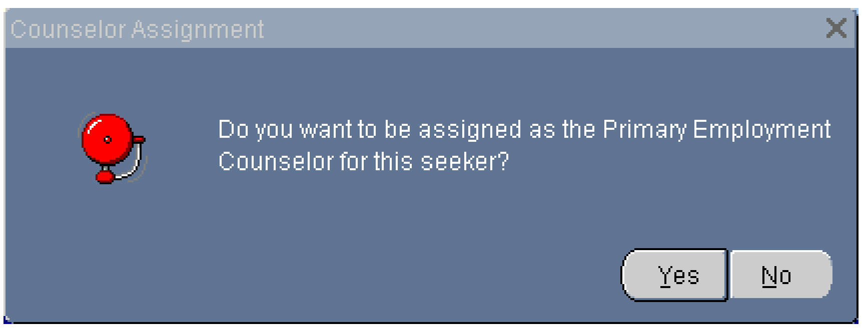


Figure 10: Primary Employment Counselor

3. If you clicked "No", select the appropriate counselor from the list of counselors. (see Figure 11)

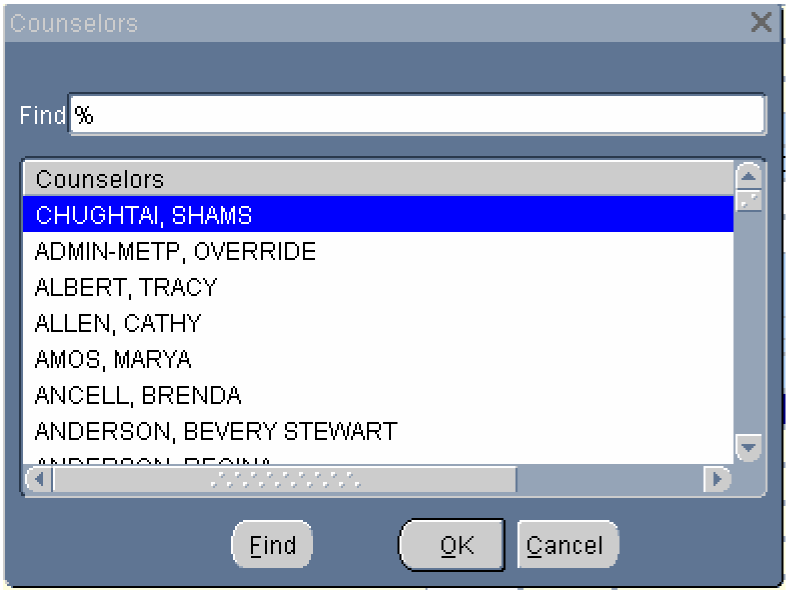


Figure 11: Primary Counselor List of Values

NOTE: If the client is a CAP Applicant or Recipient referral, there will be a referral in the Referral System Program field.

4. Click on the checkbox next to the appropriate referral.
5. Click on the **Enroll** button to enroll the client.
6. Click on the **Save** button to save the enrollment. (see figure 12)

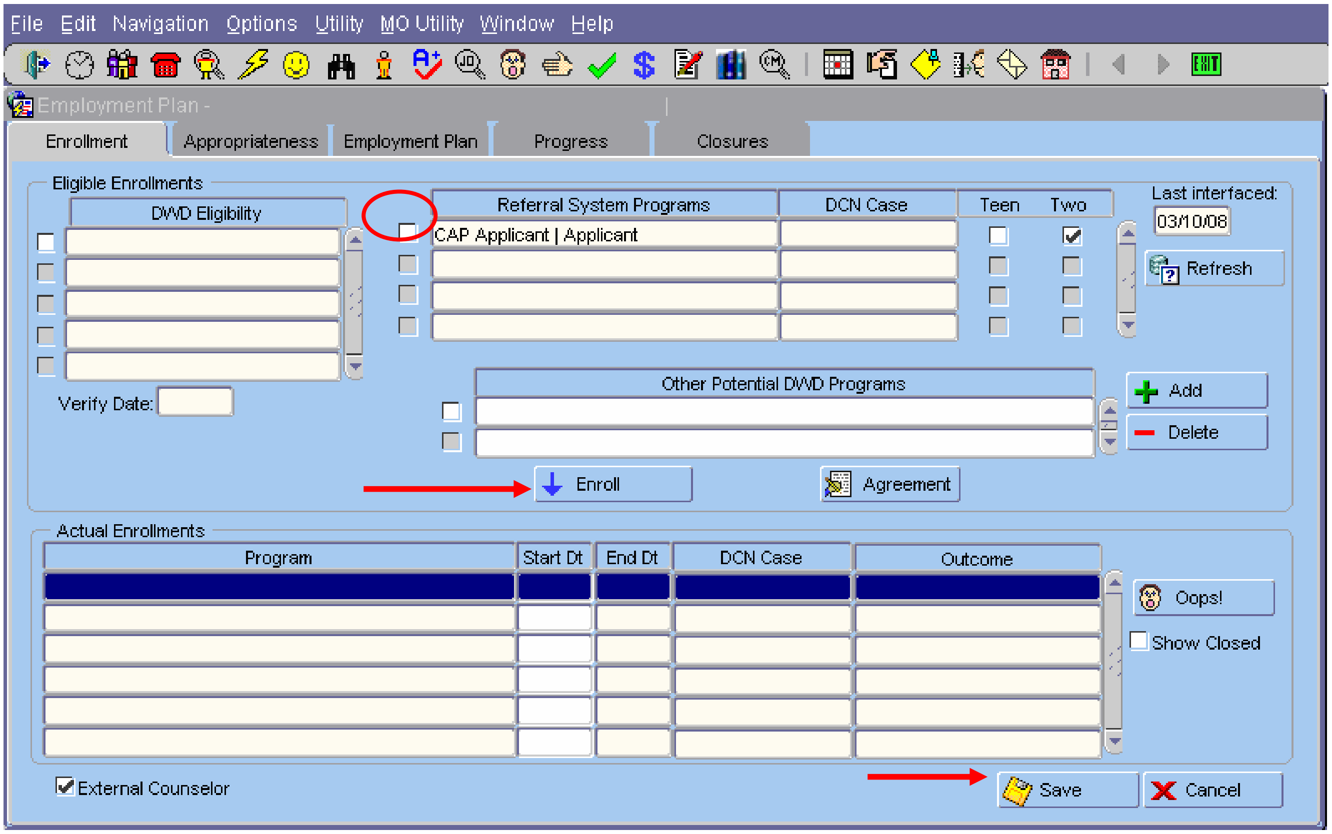


Figure 12: Enrollment Screen

Assessment

Completing the assessment for a CAP client

You must review all tabs in the  “**Assessment**” section and complete those that apply.

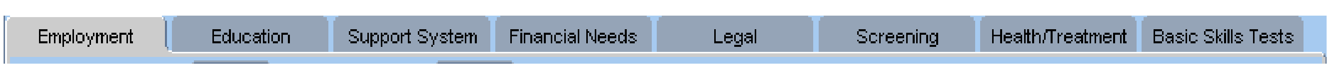
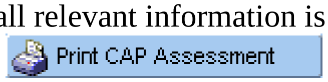


Figure 13: Assessment Tabs

Printing the assessment form for Client to sign

1. Ensure that all relevant information is entered in the “Assessment” section.
2. Click on the 

button to print the CAP assessment form.
3. Ensure that the CAP client signs the printed CAP assessment form.

Immediate Engagement

Once a client has enrolled in CAP as an applicant, FSD needs to be notified that they have complied with Immediate Engagement.

Step-by-Step:

1. Enroll client as an applicant.
2. Complete assessment for the client.
3. Click on the  icon (or press CTRL + E)
4. Select the “Appropriateness” tab
5. Select the “CAP” sub tab.
6. Complete the Short and Long term Occupational and Educational Goals.
7. Click on the “Save” button.

NOTE: This will send a compliance code to FSD.

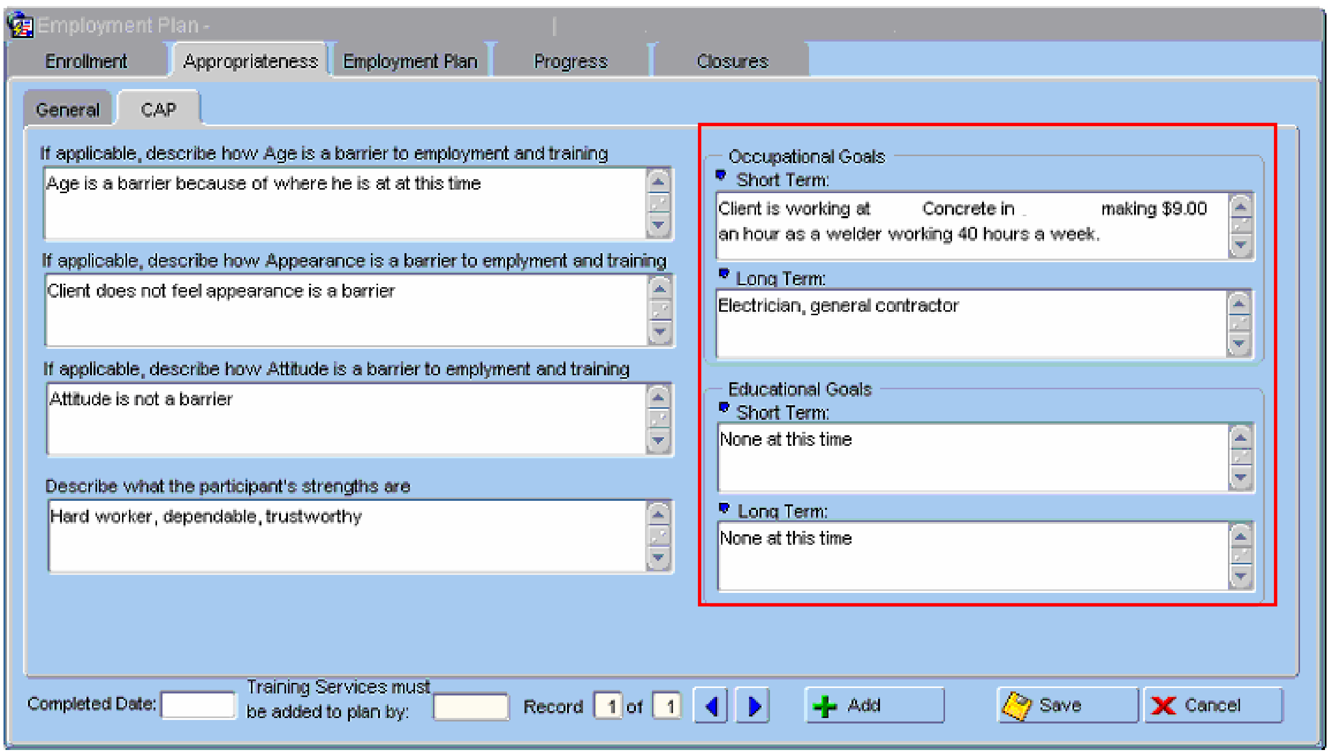


Figure 14: Appropriateness Tab for CAP

Participation Hours

Entering client participation hours

Step-by-Step:

1. From the Employment Plan/Enrollment screen, select the Employment Plan tab.
2. In the "**Comments**" field at the bottom of the screen, enter the required number of hours. (It may be necessary to scroll down to view this field.)

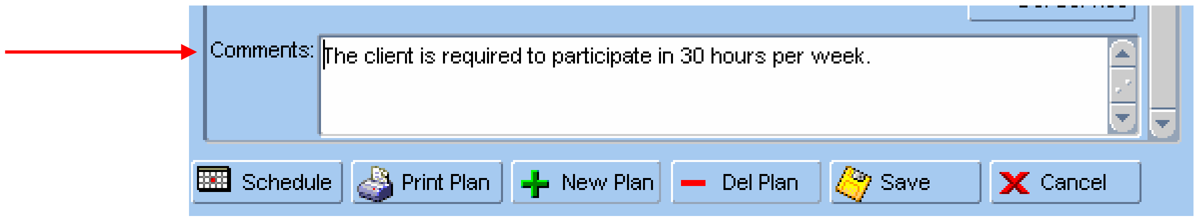


Figure 15: Participation Hours

Services (Activities)

Entering services (activities)

Step-by-Step:

1. Click on the Employment Plan/Enrollment icon (or press CTRL + E)
2. Select the Employment Plan tab.
3. Complete the following fields:
   - O*Net
   - Goal
   - Justification
4. Double click on the Objective field (or press F2)
5. Choose Objective and Service

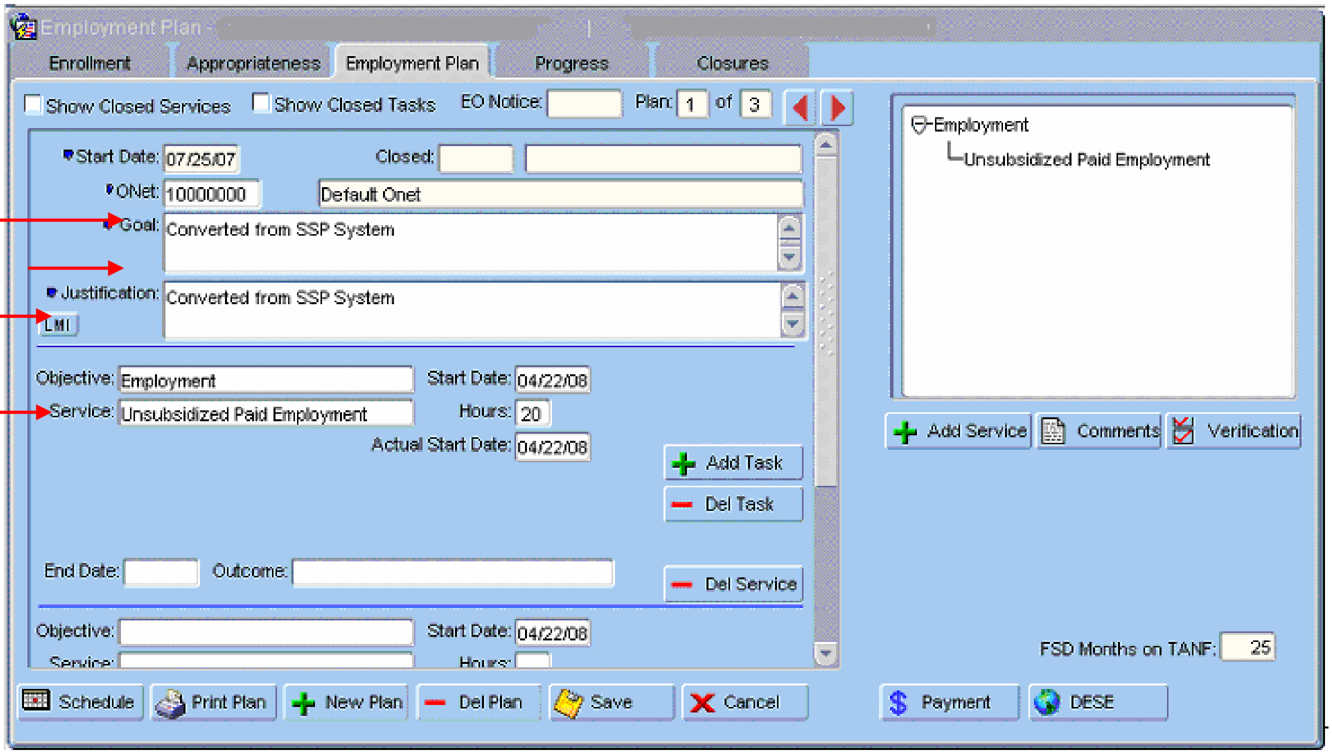


Figure 16: Entering Services

Employment Plan

Printing Employment Plan

Step-by-Step:

1. Click on the Employment Plan/Enrollment icon (or press CTRL + E)
2. Select the “Employment Plan” tab.
3. Click on the  button
4. Ensure that you review the plan with the client.
5. Have the client sign the plan.

Services (Activities)

The following CAP Objectives and Services can be used to enter activities in the Employment Plan tab (see Figure 16)

OBJECTIVE: ASSESSMENT	
CAP Assessment	Conducting an initial interview and assessment, completion of any participation agreement, identifying strengths and barriers to develop a plan for obtaining employment. This plan must

	include a participant's educational and employment goals. Also, assessment is administering tests in determining skills, such as reading/math, aptitude, interests, work maturity, and medical/mental health evaluations.
Conciliation	Process to resolve barriers preventing participation in the program.
Trial Participation	An enrolled CAP recipient must demonstrate participation in an allowable work activity before the sanction can be recommended to be lifted. The recipient must participate for 2 consecutive weeks.

OBJECTIVE: BASIC EDUCATION	
AEL	Enrolled in adult literacy classes to obtain a GED or High School equivalency. **CORE for Teen Parents**. **NON-CORE for all other CAP recipients.**
CAP Basic Skills/Remediation	Enrolled in training that may include: adult education, literacy activities, remedial reading, writing, mathematics, or a combination thereof; for customers who have proficiencies below the ninth grade level or to improve basic skills to a level greater than the customer held at assessment. Pre-requisite courses are not approvable and should not be reported at this service. **For CAP recipients** who have obtained a High School diploma or GED. For Trade Act, GED, ABE, AEL, and ESL/LEP are allowable as basic skills remediation. **NON-CORE CAP Activity**
GED Test	Test of General Education Development; exam administered to those trying to obtain a GED. **NON-CORE for CAP**.
High School	Upper secondary school which educates recipients for grades 9 through to grade 12. For the purposes of CAP, this service also includes recipients who are attending grade school and middle school. **CORE CAP Activity** = Teen Parents. **NON-CORE CAP Activity** = All other recipients.
High School Equivalency	**CORE for Teens. NON-CORE for everyone else.**
Job Skills Training Directly Related to Employment	Any training or education for specific job skills required by an employer to provide an individual with the ability to obtain employment or to

	advance or adapt to the changing demands of the workplace. This includes: Occupational/ Vocational Education training beyond 12 months, AEL, High School Equivalency, and Limited English Proficiency. **NON-CORE CAP Activity.**
Limited English Proficiency	Classes that teach English proficiency and language development to non-English speaking recipients; and participants whose native language is not English. **CORE CAP Activity** = Teen Parents. **NON-CORE CAP Activity** = All other recipients.

OBJECTIVE: EMPLOYMENT	
Compensation in Lieu of Wages	Receiving commodities such as housing, transportation, childcare, etc., (using the fair market value and the federal minimum wage calculation) in lieu of wages for work performed. **CORE CAP Activity.**
Self Employment	An individual who actively earns income directly from his own business, trade or profession rather than as wages or salary from an employer. May include, but is not limited to: domestic work, ranching, farming, fishing, commission work, and the provision of childcare. **CORE CAP activity.**
Subsidized Employment-Private	This is private sector employment for which the employer receives a subsidy from TANF or other public funds to offset some or all of the wages and costs of employing a recipient. The recipient is paid wages and receives the same benefits as a non-subsidized employee who performs similar work. **CORE CAP Activity.**
Subsidized Employment-Public	This is public employment for which the employer receives a subsidy from TANF or other public funds to offset some or all of the wages and costs of employing a customer. The recipient is paid wages and receives the same benefits as a non-subsidized employee who performs similar work. **CORE CAP Activity.**
Unsubsidized Paid Employment	Full or part-time employment in the public or private sector that is not subsidized by TANF or

	any other public program. **CORE CAP Activity.**

OBJECTIVE: EMPLOYMENT-RELATED EDUCATION	
CAP Occupational/Vocational Education Training	**For CAP**, organized educational programs that are directly related to the preparation of individuals for employment in current or emerging occupations requiring training, including a baccalaureate degree. **CAP CORE activity.**
CAP OJT (On-the-job Training):	Training by an employer that is provided to a paid participant while engaged in productive work in a job that provides knowledge or skills essential to the full and adequate performance of the job; provides reimbursement to the employer of up to 50% of the wage rate of the participant, for the extraordinary costs of providing the training and additional supervision related to the training; and is limited in duration as appropriate to the occupation for which the participant is being trained, taking into account the content of the training, the prior work experience of the participant, and the service strategy of the participant, as appropriate. **CAP CORE Activity.**
Work-Study	Work-Study is an educational benefit for undergraduate students with financial need. Work-Study placements are sites developed or contracted out by educational institutions where students who qualify for this benefit are placed to work and receive a stipend. The stipend is usually received as an hourly salary and earnings are not counted in their budget for Temporary Assistance. **CAP CORE Activity.**

OBJECTIVE: FOLLOW-UP
CAP case managers can not use any services under this objective.

OBJECTIVE: INTENSIVE EMPLOYMENT SERVICES
CAP case managers can not use any services under this objective.

OBJECTIVE: JOB SEARCH ASSISTANCE	
Job Readiness	Participation in workshops dealing with resume writing, interviewing, interpersonal relationships in the workplace, as well as employer expectations regarding dress, grooming, ethics, responsibility, etc. **CORE CAP Activity.**
CAP Job Search Assistance	The act of searching for a job to obtain employment. This includes self-directed job search and staff-assisted job search. **CORE CAP activity.**

OBJECTIVE: LIFE SKILLS	
Temporary Waiver-Pregnant in Third Trimester	Open this service when the recipient is temporarily pregnant in the third trimester preventing the recipient from participating.
Temporary Waiver-Temporary Disabled	Open this service when the recipient is temporarily disabled preventing the recipient from participating.
Temporary Waiver-Transportation	Open this service when the recipient needs to resolve transportation issues preventing them from participating.
Temporary Waiver-Active in Children's Division	Open this service when the recipient has an active case with Children's Division preventing the recipient from participating.
Temporary Waiver-Childcare	Open this service when the recipient needs to resolve childcare issues preventing them from participating.
Temporary Waiver-Domestic Violence	Open this service when the recipient has issues with Domestic Violence preventing them from participating.

OBJECTIVE: TREATMENT	
Job Readiness-MH	Addressing job readiness issues by participating in activities relate to treatment of a mental health condition such as attending counseling sessions, participating in day treatment, or any short-term treatment. The recipient must be otherwise employable, and the need for this service must be based on the documentation from a medical doctor or physician supported by medical evidence. **CORE CAP Activity.**
Job Readiness-PT	Addressing job readiness issues by participating in activities related to treatment of a medical condition. This includes physical therapy and any treatment required that is directly linked to improving the recipient's medical condition. The recipient must be otherwise employable, and the need for this service must be based on documentation from a medical doctor or physician supported by medical evidence. **CORE CAP Activity.**
Job Readiness-SA	Addressing job readiness issues by participating in activities related to resolving drug, alcohol or substance abuse barriers. The recipient must be otherwise employable, and the need for this service must be based on documentation from a medical doctor or physician supported by medical evidence. **CORE CAP Activity.**
Treatment and Support-MH	Participating in activities related to treatment of a medical condition such as attending counseling sessions, participation in day treatment, or any short-term treatment.
Treatment and Support-PT	Participating in activities related to treatment of a medical condition. This includes physical therapy and any treatment required that is directly linked to improving the participant's medical condition.
Treatment and Support-SA	Participating in activities related to resolving drug, alcohol or substance abuse barriers.

OBJECTIVE: WORK SITE LEARNING	
<u>AWEP/CWEP</u>	An individualized volunteer work activity that provides a recipient with an opportunity to acquire the general skills, training, knowledge, and work habits necessary to obtain employment. The purpose of work experience is to improve the employability of those who cannot find unsubsidized employment. This activity must be supervised by an employer, work site sponsor, or other responsible party and be consistent with recipients Individual Employment Plan (IEP) whenever possible. Hours are based on FLSA standards, cash grant and food stamps amount. **CORE CAP Activity.**
<u>CAP Community Service Programs</u>	A structured program for recipients who are not otherwise able to obtain employment. The emphasis is on improving employability and good work habits. Good work habits include, but are not limited to: regular attendance, consistent punctuality, positive attitude and behavior, appropriate appearance, good interpersonal relations and effective task completion. It is also to perform work for the direct benefit of the community under the auspices of public or non-profit organizations. Community service programs must be limited to projects that serve a useful community purpose in fields such as: health, social service, environmental protection, education, urban and rural redevelopment, welfare, recreation, public facilities, public safety, and childcare. Hours are based on FLSA standards, cash grant, and food stamp amounts. **CORE CAP Activity.**

Work History

Entering a Work History

Step-by-Step:

1. Click on the  icon (or press Ctrl + A)
2. Select the “Employment” tab.
3. Click on the “Add” button.
4. Enter Employer Name in the “Employer” field.
5. Enter City in the “City” field
6. Enter State in the “State” field
7. Enter Job Title of the client
8. Enter the start date of the client. (MM/YY format)
9. Enter the end date of the client, if appropriate. (MM/YY format)
    - “Months” field will automatically calculate the number months of employment.
10. Indicate how the Salary is calculated (hourly, daily, weekly, monthly, yearly) in the “per” field
11. Indicate salary amount in the “Salary” field.
12. Enter number of hours worked in a week, in the “Hrs. Wk.” field.
13. Enter the Job description in the “Job Description” field.

Verifying a Work History:

Step-by-Step:

1. Click on the  button in the Employment tab.
    - This will open the verification box.
2. Click to check the “Verified” checkbox if the employment has been verified.
3. Select type of employment from the “Type” field.
4. Click on “Close”.

NOTE: This will send an alert to FSD indicating that employment has been verified.

<u>Verifying termination of employment:</u>

Step-by-Step:

1. Click on the button in the Employment tab.
   - This will bring up the verification box.
2. From the "Reason for Leaving" drop down menu, click to select the reason for termination.
3. Click to check the "Verified Termination".
4. Click on "Close".

NOTE: This will send an alert to FSD indicating that the employment has been terminated with the employer.

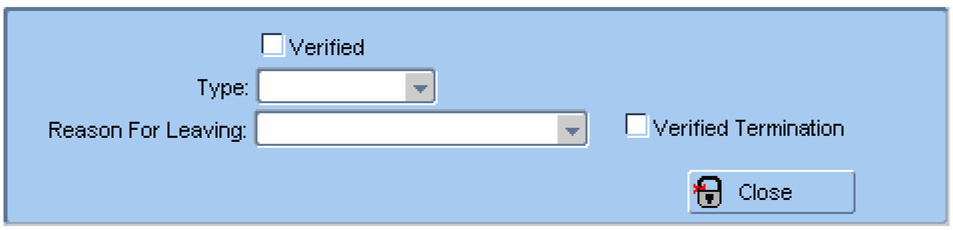


Figure 17: Verifying termination

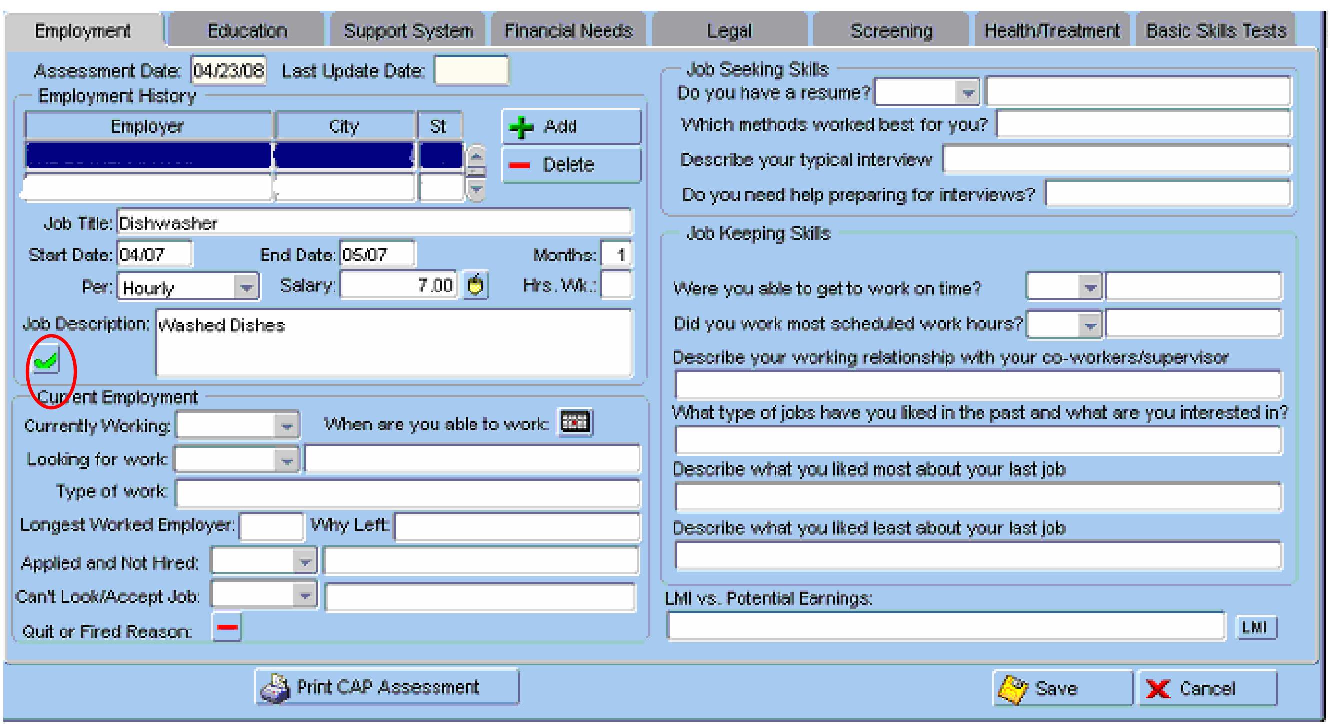


Figure 18: Employment

Alerts to FSD

Sending an alert

Step-by-Step:

1. Open the seeker record
2. From the Options menu, select “Seeker Alerts”.
3. From the Alert dropdown menu, select appropriate alert.
4. Click on “Save” to send the alert.

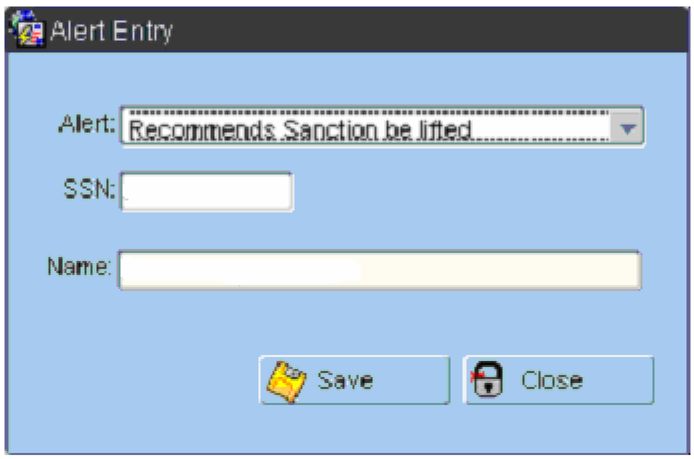
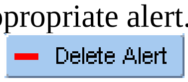


Figure 19: Alerts

Deleting Alerts

When an alert has been sent, it can only be deleted up to 4:00 pm of the same day.

Step-by-Step:

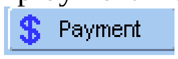
1. Select MO Utility, and them Alerts Review.
2. This will bring up the “Daily referrals Query” screen.
3. Bring up the appropriate referral by using the date, DCN, Program or Counselor criteria.
4. Select the appropriate alert.
5. Click on the 

button to delete the alert.

Payments: WRE

Authorizing WRE payments

Step-by-Step:

1. Click on the  Employment Plan/Enrollment icon (or press CTRL + E)
2. Select the Employment Plan tab.
3. Click on the 

button.
   - This will open the payment screen.
4. Click on the “Work Tab” to enter the payments.

Entering payments

1. Click to select the Vendor.
2. Enter the Pay Amount.

NOTE: “**Total All WRE’s**” field indicates available funds

3. Select the type of purchase from “Pay Expense” drop down menu.
4. Enter a description of WRE payment in the “Description” field.
5. In the “Services” field hit F2 to select a service that will be tied to this payment.
6. Click “Save” when complete.

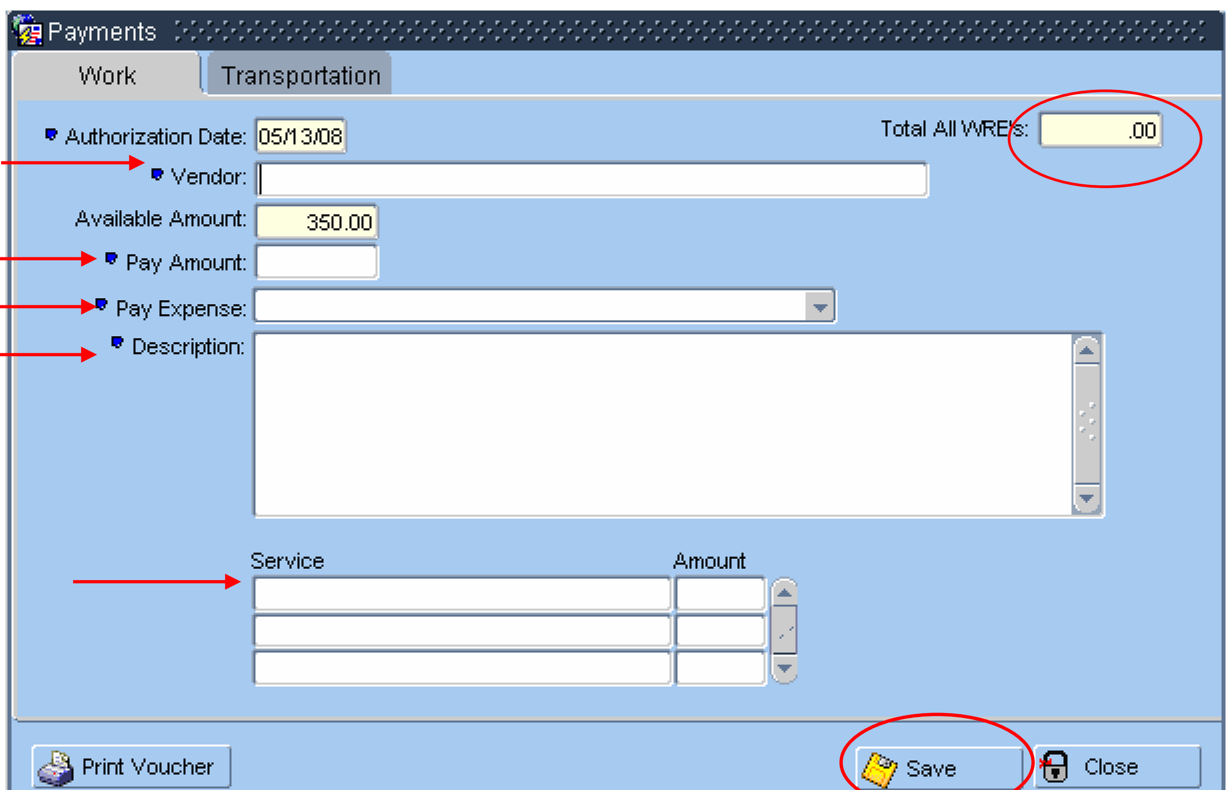
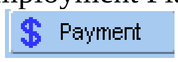


Figure 20: WRE payments

Payments: TRE

Authorizing Recipient TRE payments

Step-by-Step:

1. Click on the  Employment Plan/Enrollment icon (or press CTRL + E)
2. Select the Employment Plan tab.
3. Click on the  button.
    1. This will bring up the payment screen.
4. Click on the "Transportation" Tab to enter payments. (see figure 21)
5. Select the date range that corresponds to the appropriate service.
    - Authorization date will automatically default to current date.
6. Select appropriate date (if it is not the current date)
7. Enter appropriate value for each day in the "Payment Details" fields.
8. Click "Save" when complete.

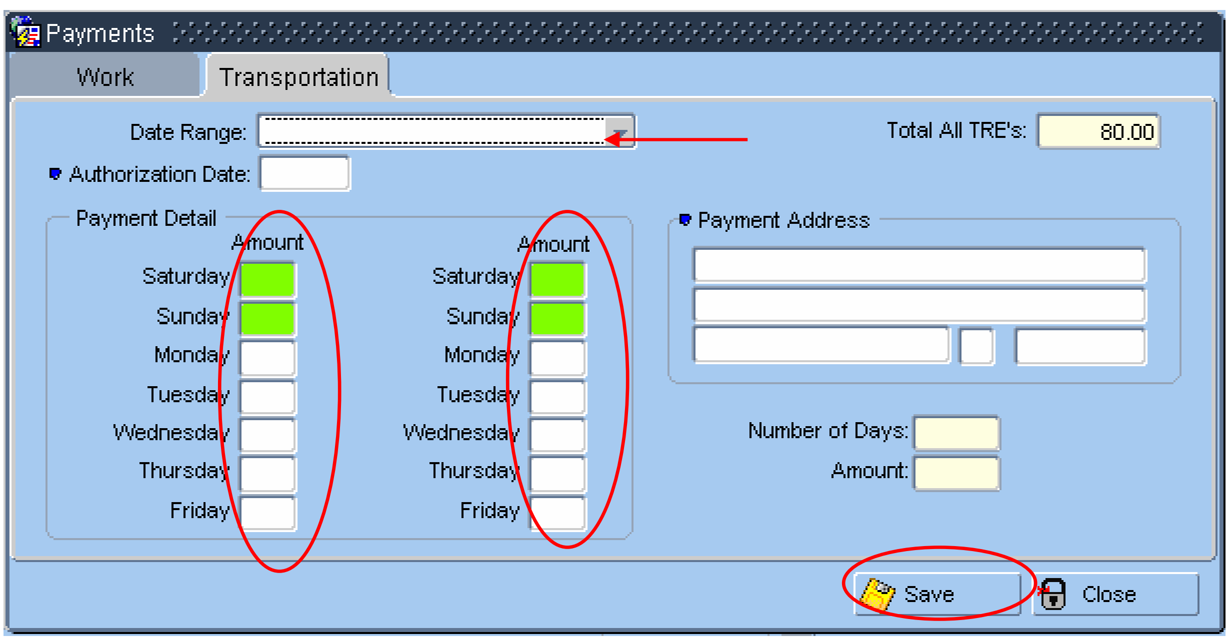


Figure 21: WRE payments, Transportation Tab

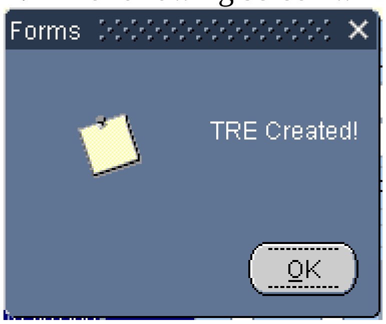
NOTE: In order to enter TRE payments there must be a service (activity) for the time period of the TRE payment.

Authorizing One-Time Applicant TRE payment

Step-by-Step:

1. Click on the  Employment Plan/Enrollment icon (or press CTRL + E)
2. Select the Employment Plan tab.
3. Click on the 

button located on this screen, this will authorize the one time TRE payment.
4. The following screen will appear.

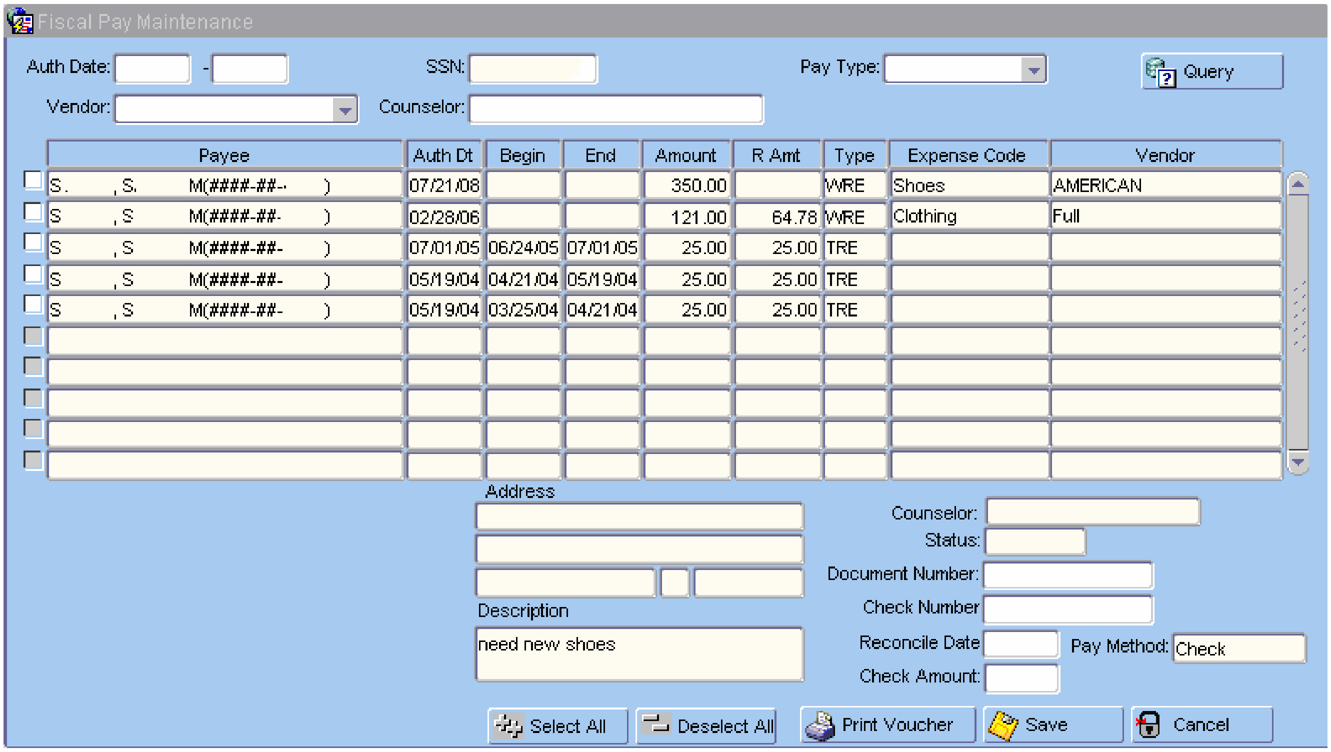


5. Click "Ok".

Payments: Reconciling

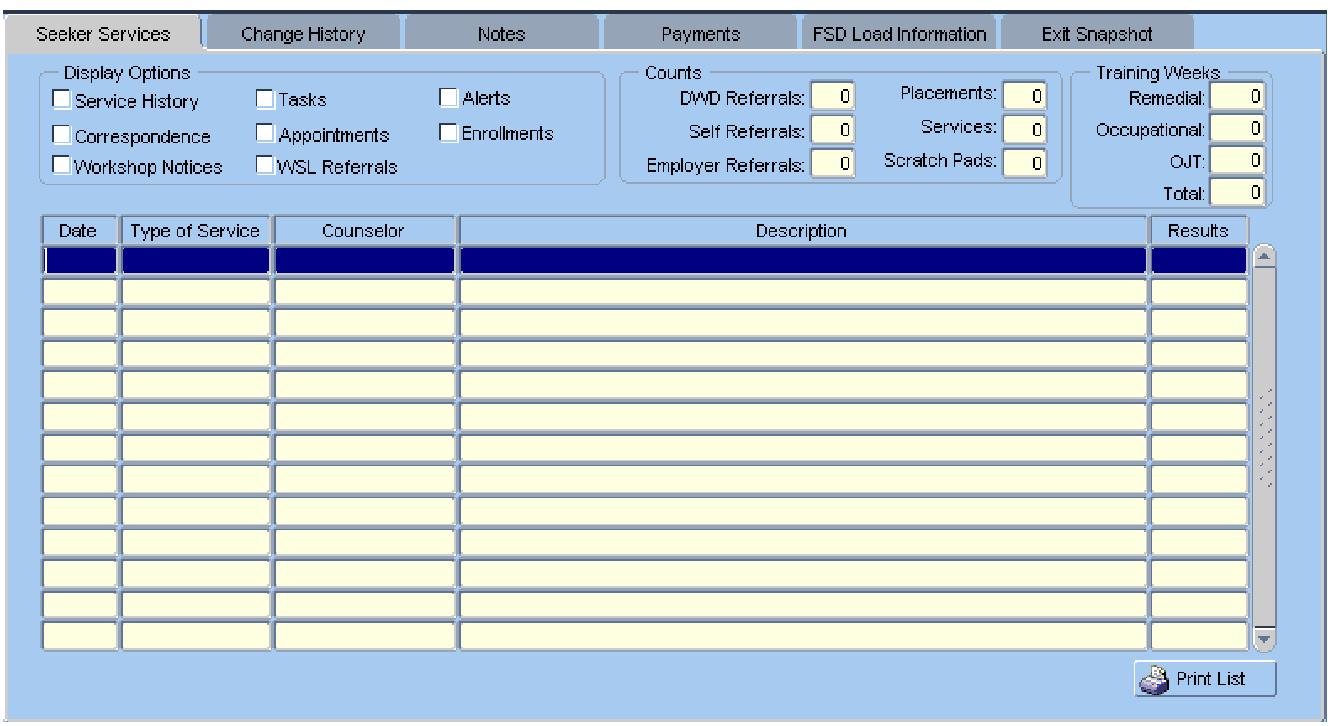
Step-by-Step:

1. From the top menu select MO Utility then Fiscal Payment Query.
2. Enter the Social Security Number to bring up the record. If you are reconciling multiple records you can also bring up records by Date, Pay Type, Vendor and Counselor.
3. Highlight payment that you would like to reconcile from the list.
4. Enter appropriate Document Number and Check Number.
5. Enter Reconcile Date.
6. Enter the appropriate Check Amount, if the amount is the same as the requested amount, enter the requested amount.
7. Click on the Save button.



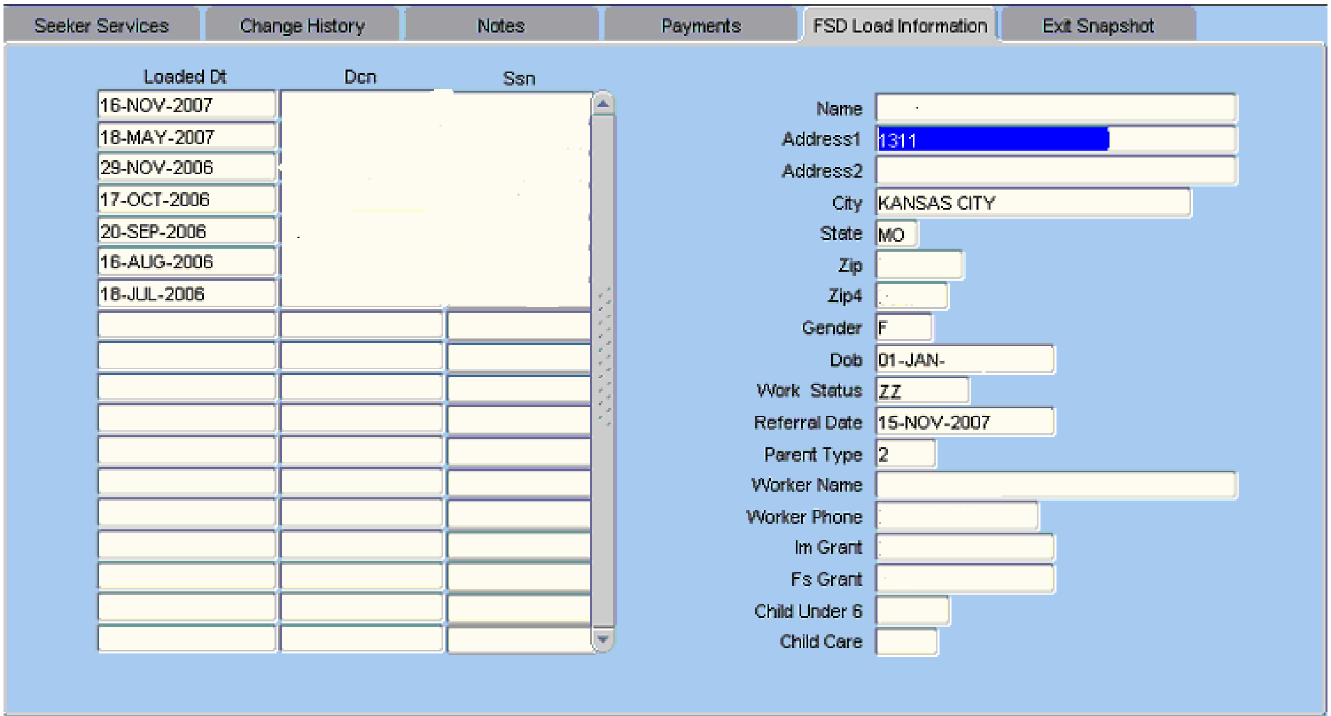
Seeker History (Tire)

This screen is similar to the TIRE, and has much of the same information.



FSD Load Information (FSD Daily File)

This screen lists the same information that was listed in the Daily file screen in Toolbox 1.0.



Case Notes

<u>Entering a case note</u>

Step-by-Step:

1. Click on the  "Notes" icon to open the case note screen.
   - You can view the detailed case note by selecting the appropriate case note.

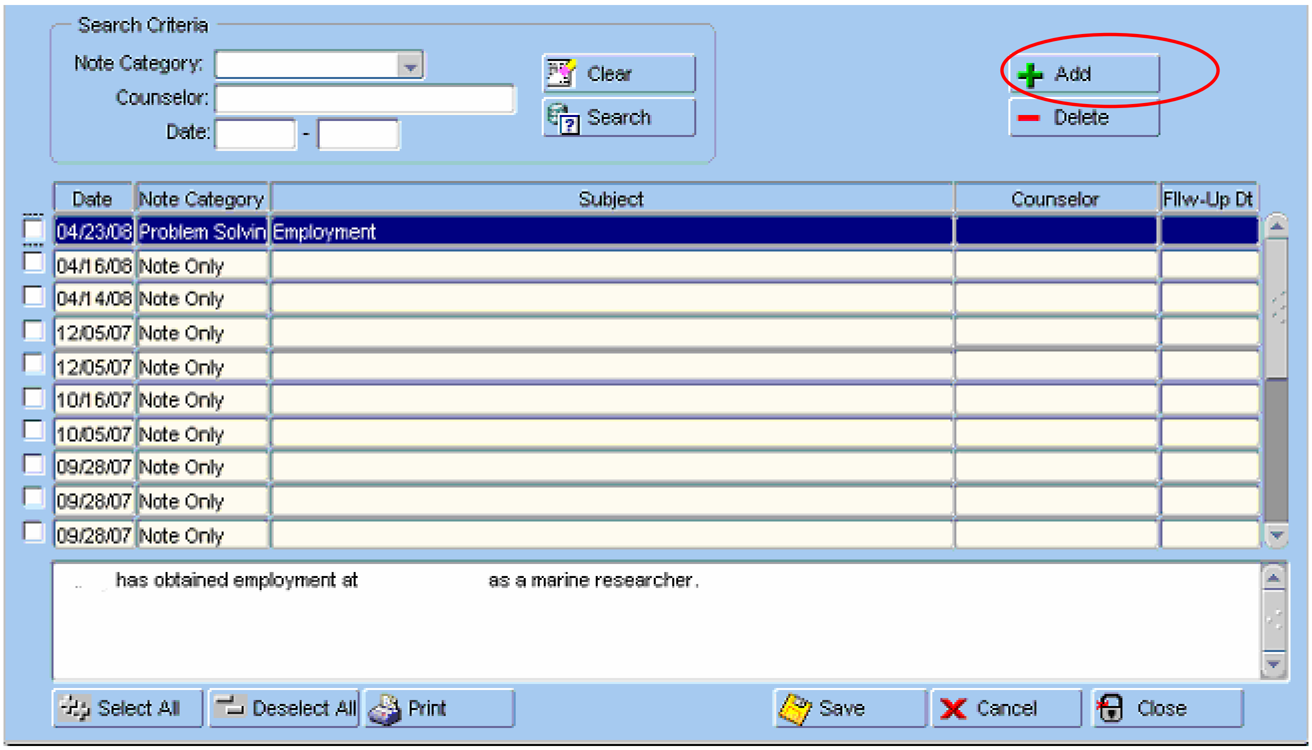


Figure 22: Case Notes

<u>Adding a case note</u>

Step-by-Step:

1. Click on the  button (or press ALT + N) to open the case note entry screen.
2. Select the appropriate Note Category from the "Note Category" drop down menu.
3. Type the appropriate subject of the note in the "Subject" field.
4. Type the case note into the "Notes" field.
5. Enter "Follow-up Date" if appropriate.
6. If you would like a hard copy for your records click to select the "Print on Save" checkbox.
7. Click the "Save" button to save the case note.

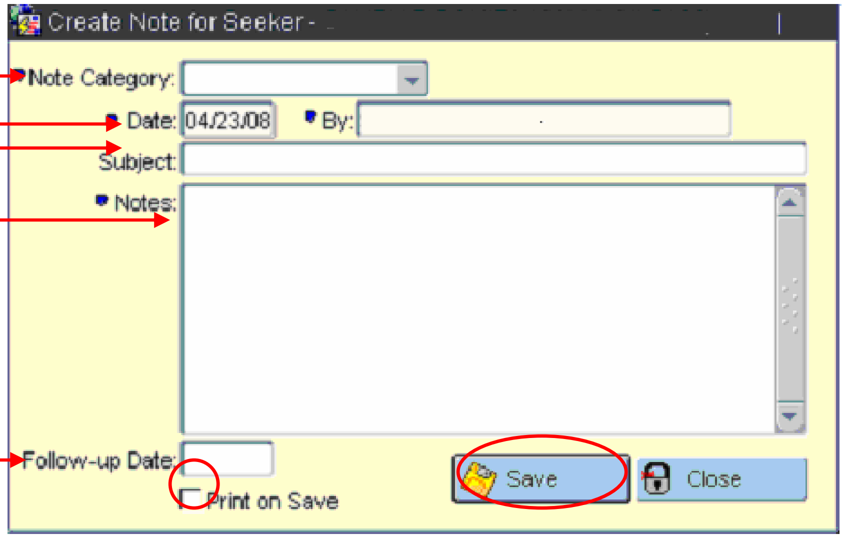


Figure 23: Case Note Screen

Case Management Search

Viewing the list of your CAP clients

Step-by-Step:

1. Click on the  Case Management Search icon (or press CTRL + G).
2. Click on the "Search" button.
3. This will bring up a list of all the clients that are assigned to you.

To view only CAP recipient records or only CAP applicant records

Step-by-Step:

1. Select the appropriate entry from the List of Values (LOV)
2. Click on the "Search" button.

NOTE: To refine the search even further, click on the "Additional" Tab.

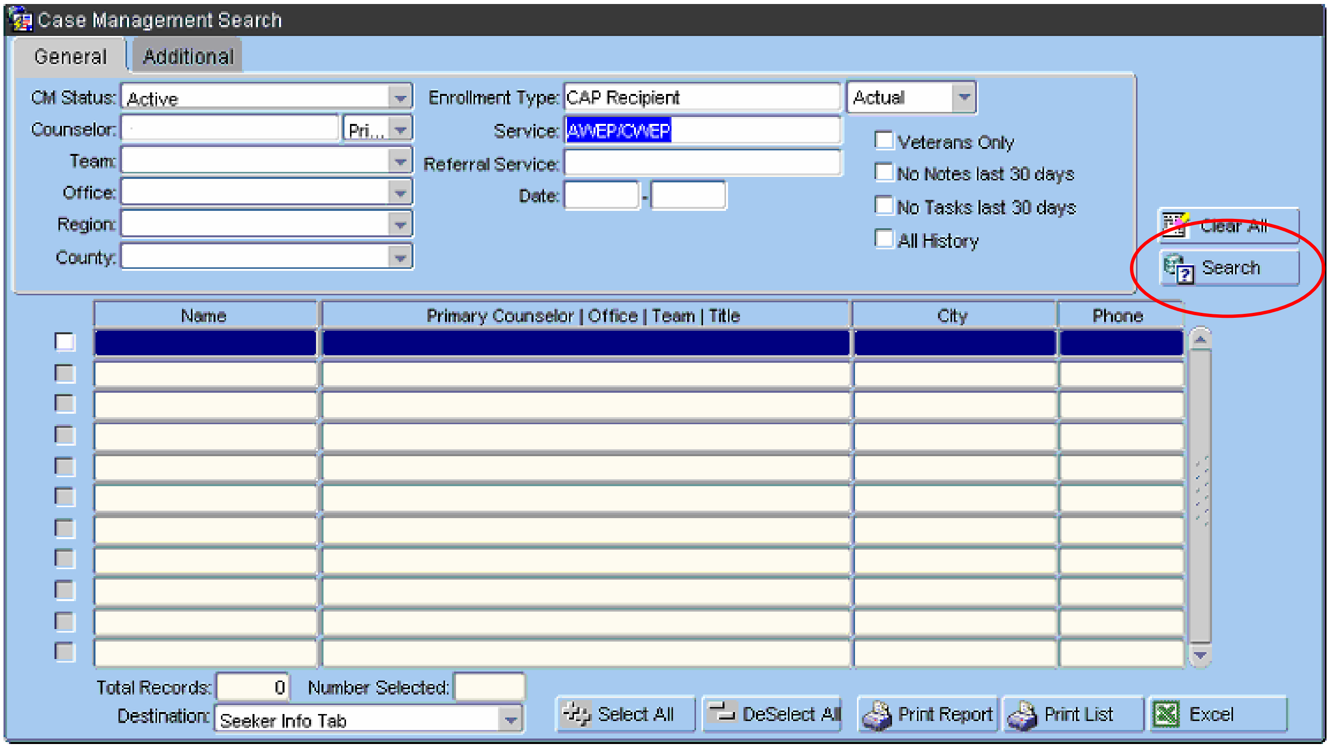


Figure 24: Case Management CAP Search

Changing Agent Hats

Changing Agent Hats

Step-by-Step:

1. From the "File" menu, select "Change User Title".
2. On the "Change Agent Hat" screen, select the appropriate office from the drop down menu.

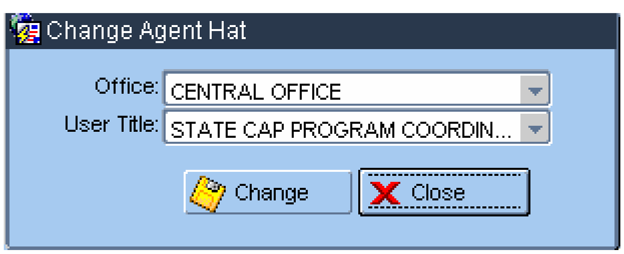


Figure 25: Change Agent Hat

Changing Office Locations

Switching between offices

Step-by-Step:

1. From the File menu, click to select the Change User Title option.
2. Click to select the appropriate office from the drop down menu on the Change Agent Hat screen.

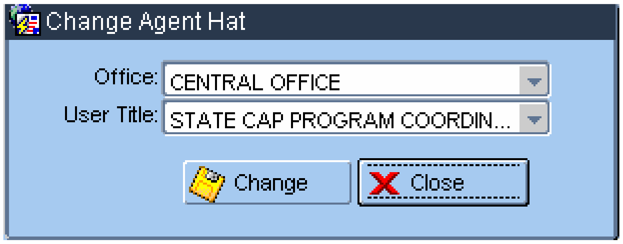


Figure 11: Change Agent Hat